

Vinlab Client Portal User Guide

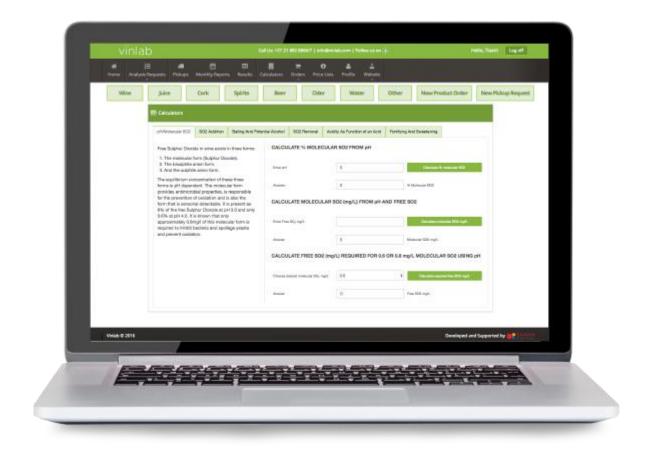




Table of Contents

<u>Introduction</u>		3
1. Registration, Signing In		4
<u>1.1 R</u>	egistration Process	4
1.2 S	igning in	5
2. Your Dashboard		6
3. Navigation		7
3.1. D	<u>ashboard</u>	7
3.2 A	nalysis Requests	7
3.2.1	Add New Requests	7
3.2.2	Pending Requests	7
3.2.3	Accepted Requests	8
3.3 Pickups		9
3.3.1	Overview	9
3.3.2	Create new pickup request	9
3.4 M	onthly Reports	10
3.4.1	Generate monthly report	10
3.4.2	Download Monthly Report	10
3.5 R	<u>esults</u>	11
3.5.1	Generate sample results report	11
3.5.2	Download sample selection	11
3.6 Calculators		12
3.7 O	<u>rders</u>	13
3.7.1	Create New Order	13
3.8 Price Lists		14
3.9 Y	<u>our profile</u>	15
3.10 Invite Users		16
4. Analysis Requests		17
<u>4.1 W</u>	/ine, Juice, Cork, Spirits, Beer, Cider, Water & Other	17
4.1.1	Make request selections	18
4.1.2	Additional requests and Submit request	19
4.1.3	Prepare samples for analysis	20
4.1.4	Finish and Print	21
5. Creating and Managing Custom Templates		22



Introduction

The Vinlab app is to help client to increase the speed of analysis.

CONTACT DETAILS

Address: Vinlab

Oude Molen Building

Distillery Road Stellenbosch

7600

Telephone: 021 882 8866 Email: info@vinlab.com

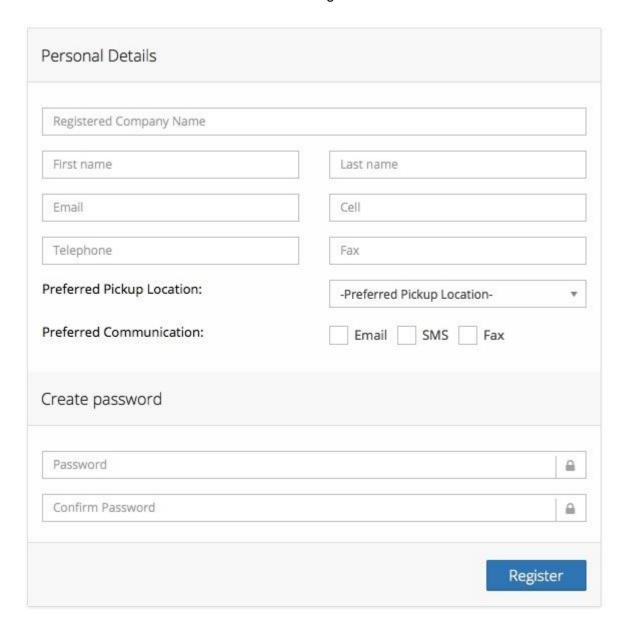


1. Registration, Signing In

1.1 Registration Process

To register for an account go to http://client.vinlab.com/Account/Register. All the fields are required to be completed.

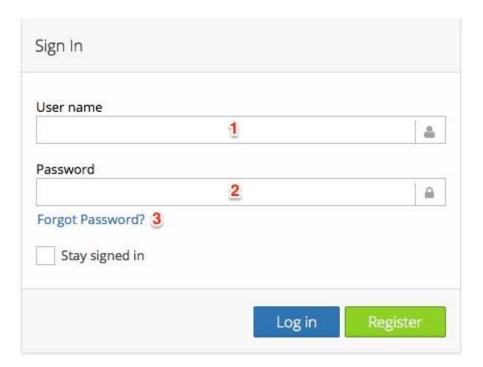
Once you have submitted your registration Vinlab will confirm your details and activate your account. You will receive an email once the registration has been confirmed.





1.2 Signing in

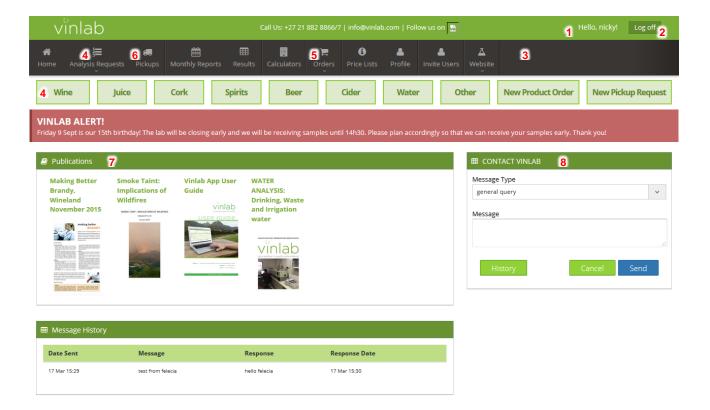
To sign in to your account go to http://client.vinlab.com



- 1. Insert email address
- 2. Insert password
- 3. Forgot password link



2. Your Dashboard



- 1. Logged in user. You can also access your profile by clicking on your name
- 2. Log off from the Vinlab Application
- 3. Navigation area (See breakdown in 3. Navigation)
- 4. Submit new Wine, Juice, Cork, Spirits, Beer, Cider, Water or Other request
- 5. Create new product order
- 6. Create new pickup request
- 7. Vinlab publications download
- 8. Send a quick message to Vinlab. Replies will be sent to your email.



3. Navigation



3.1. Dashboard

Refer to **Dashboard View** above

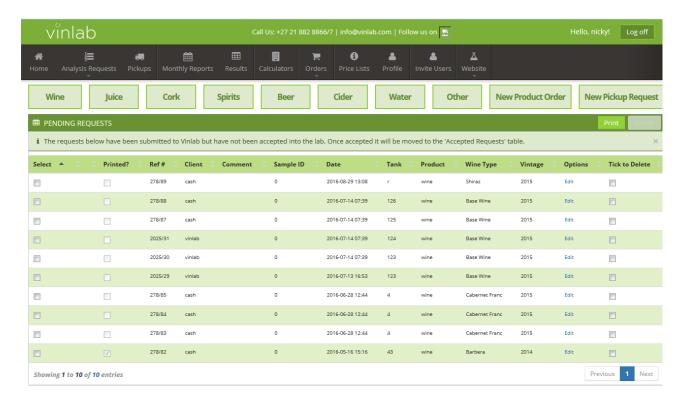
3.2 Analysis Requests

3.2.1 Add New Request

See <u>paragraph 4</u> for detailed information on how to submit new analysis requests

3.2.2 Pending Requests

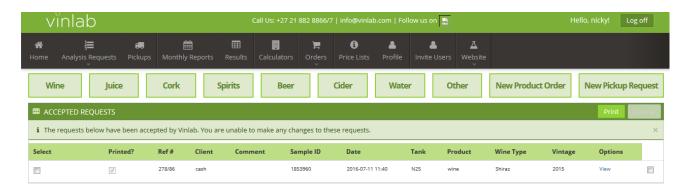
Pending requests have been submitted to Vinlab but have not been received or accepted into the lab yet. You are still able to edit your request at this stage.





3.2.3 Accepted Requests

Accepted requests have been accepted by Vinlab and can't be edited at this stage anymore. If you want to amend anything at this stage you will need to contact Vinlab directly via the messaging option on your dashboard or by calling 021 882 8866





3.3 Pickups

3.3.1 Overview



1. Request new pickups

3.3.2 Create new pickup request



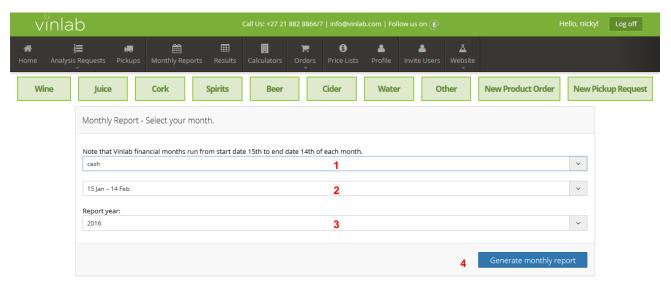
- 1. Select the date you want the pickup to occur on
- 2. Choose an alternative pickup location if it is not your default location
- 3. Add any additional notes
- 4. Cancel the request
- 5. Create the new request

NOTE: All pickup requests need to be submitted before 8am of the day the pickup is required.



3.4 Monthly Reports (desktop version)

3.4.1 Generate monthly report



- 1. Select the client (for clients that have been invited to view other clients results)
- 2. Select the month
- 3. Select the year
- 4. Generate monthly report

3.4.2 Download Monthly Report

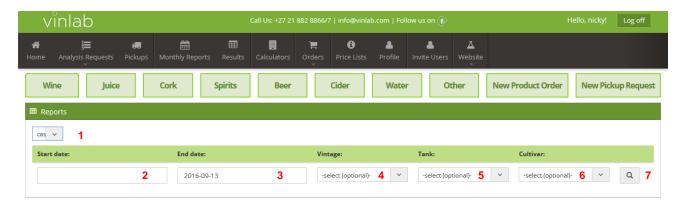
After you have generated a monthly report you are able to download it as a PDF or as an Excel document





3.5 Results (desktop version)

3.5.1 Generate sample results report



- 1. Select client (for clients that have been invited to view other clients results)
- 2. Enter start date
- 3. Enter end date
- 4. Select Vintage (optional)
- 5. Select Tank (optional)
- 6. Select Cultivar (optional)
- 7. Click search

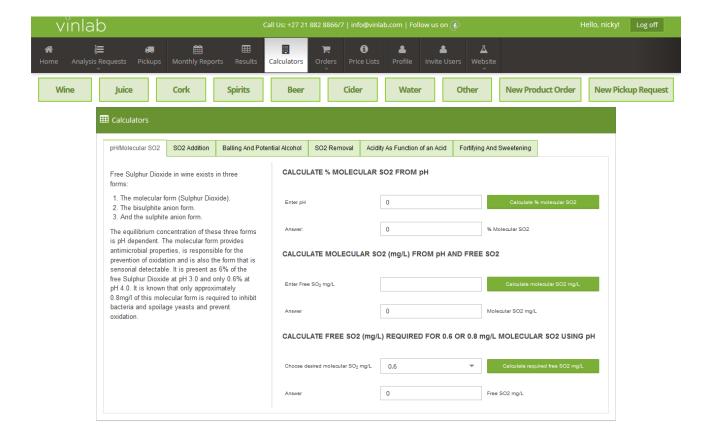
You will receive a list of results. Make a selection of certain sample results or select all to generate the report.

3.5.2 Download sample selection

After you have generated the sample report you can download it as a PDF or Excel document.



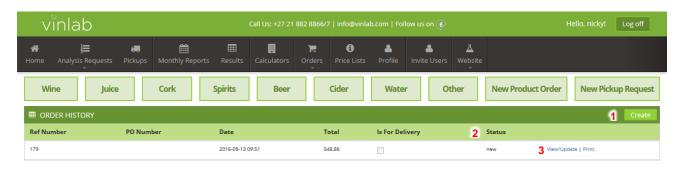
3.6 Calculators (desktop version)





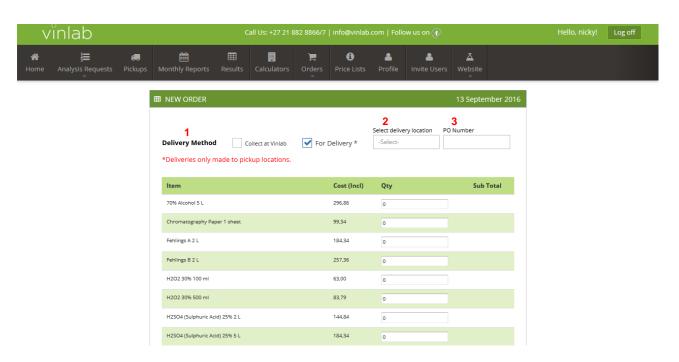
3.7 Orders

The Orders navigation option enables you to place orders for Vinlab products.



- 1. Create a new order.
- 2. Order Statuses:
 - a. Accepted: Vinlab has accepted the order and is processing it.
 - b. New: Order is in a queue at Vinlab for processing
- 3. View, Update and Print Orders. You may only update "new' orders that have not yet been accepted.

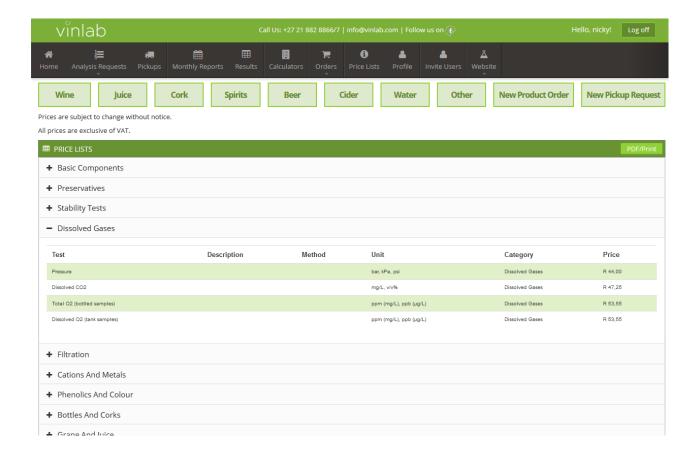
3.7.1 Create New Order



- 1. Select Delivery method (Collect or Delivery)
- 2. Select Delivery location. This list will appear when you select 'For Delivery'. You may only select delivery locations from the drop-down list.
- 3. Enter PO Number (Optional)

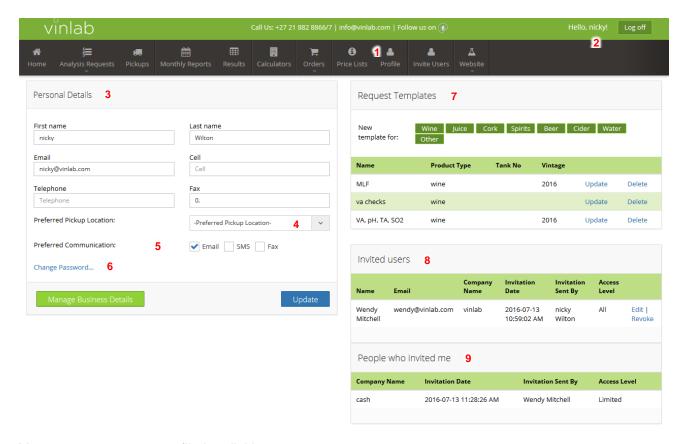


3.8 Price Lists (desktop version)





3.9 Your profile



You can access your profile by clicking:

- 1. Profile tab on the menu bar
- 2. Your name

Change your profile settings:

- 3. General account information
- 4. Preferred pickup/delivery location
- 5. Preferred communications
- 6. Password reset

Other settings

- 7. Manage your analysis request templates
- 8. Users that have been invited to have access to your account (note that only Account Administrators may invite other users to access their accounts)
- 9. Clients whose accounts you have been invited to have access to



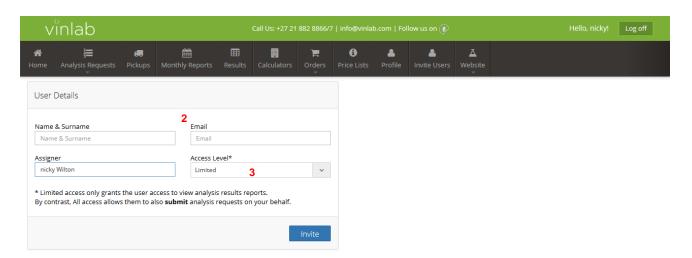
3.10 Invite Users

This function is for clients who need to submit samples and access results for more than one winery (e.g. consultants).

Go to Invite Users in the menu.



Invite a new user



- 2. Enter details of invited user
- Assign access level.
 Limited: Users can access results and monthly reports
 All: Users can access results and monthly reports, submit samples and request pickups.
- 4. View invited users and who you have been invited by in your Profile (see above)



4. Analysis Requests

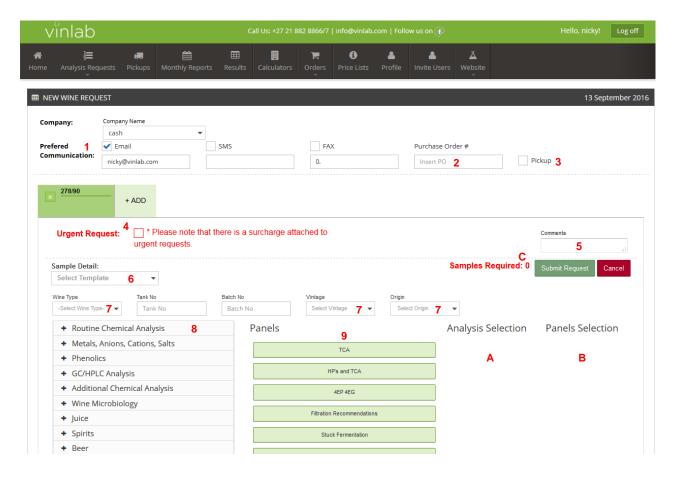
4.1 Wine, Juice, Cork, Spirits, Beer, Cider, Water & Other

Select product type: Wine, Juice, Cork, Spirits, Beer, Cider, Water, Other





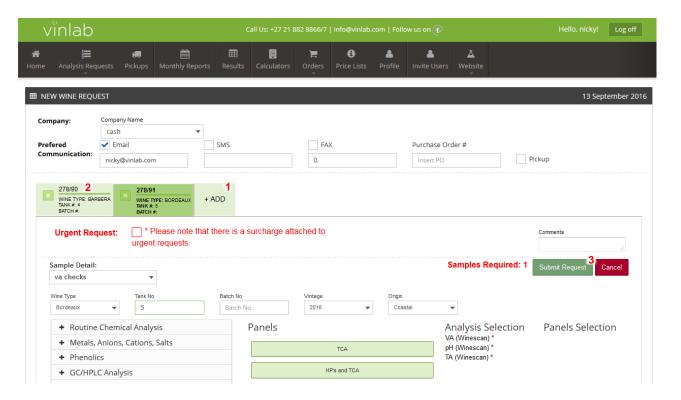
4.1.1 Make request selections



- 1. Prefered communication: Please ensure your communication preferences are correct. If you want to use other details please update it here.
 - a. Email
 - b. SMS
 - c. FAX
- 2. Purchase Order number (optional)
- 3. Pickup: Select this option if you want Vinlab to collect your samples at a selected pickup location. You only need to select pickup once per batch of samples.
- 4. URGENT requests
- 5. Add any comments you want to attach to your sample
- 6. Select template (see para 5. for more information on creating custom templates)
- 7. Note that 'Wine type', 'Vintage', and 'Origin' are required fields and must be selected from the drop-down lists. Where any of these is unknown, select 'other'.
- 8. Choose the individual analysis parameters you want to request from the drop-down lists
- 9. Select any panels you want to request
- A. Selected parameters will be added here. If you want to remove any of the selected parameters you can simply click on the item in area A
- B. Your panel selections are displayed here.
- C. Please note that you need to supply the amount of samples as indicated in the **Samples**Required section



4.1.2 Add additional requests and submit requests



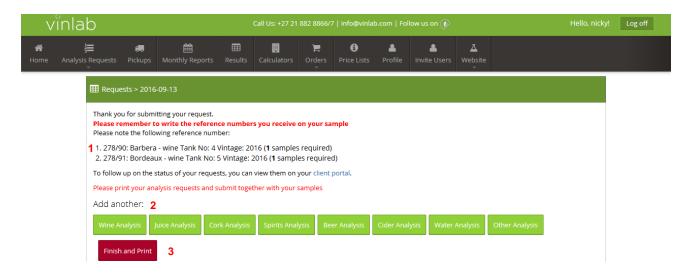
Once you have selected all the parameters:

- 1. +ADD tab, to add additional samples (a maximum of approximately 10 samples may be added)
- 2. Note the reference number allocated for each sample
- 3. Submit Request when you have finished adding all your samples



4.1.3 Prepare samples for analysis

Once you have submitted your request, you will receive a confirmation page. Please note the reference field for your sample. This needs to accompany the sample that you are submitting for analysis.



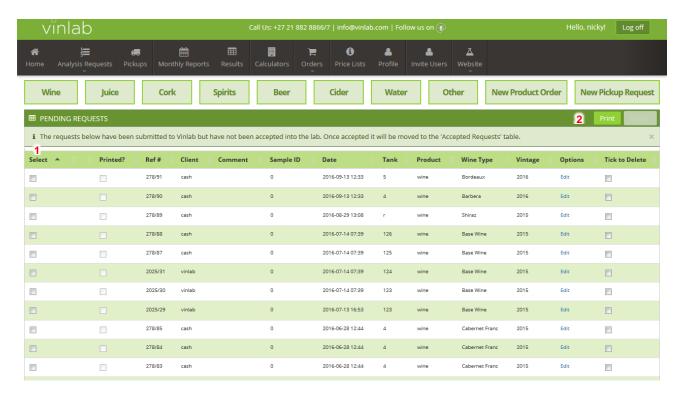
After submitting request:

- 1. Reference number to accompany each individual sample VERY IMPORTANT
- 2. Add next sample request or,
- 3. If finished requesting samples, go to Finish and Print. Select 5 samples to print per product type.



4.1.4 Finish and print

Once you have completed adding all your samples, select 'Finish and Print. You will be taken to the Pending requests page.

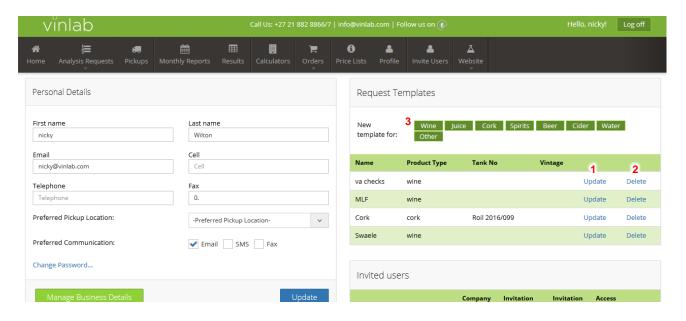


- 4. Select up to 5 samples to print per product type. You may not print different product types together.
- 5. Print selected requests
- 6. Samples should be accompanied with their printed analysis request page

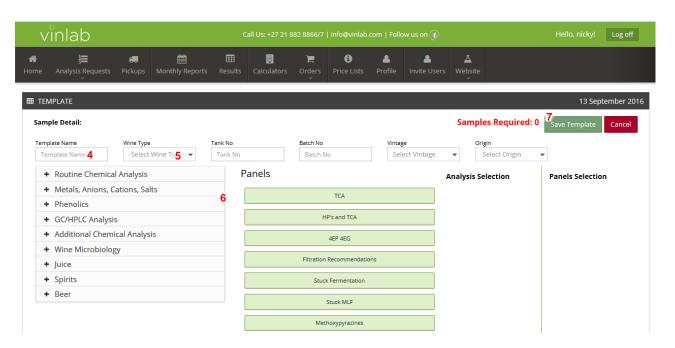


5. Creating and Managing Custom Templates

Create custom templates in your Profile



- 2. Update and edit existing templates
- 3. Delete templates you no longer require
- 4. Create new template for different product types



- 5. Enter template name
- Add any of the following selections to your template: Wine Type, Tank No, Batch No, Vintage, Origin
- 7. Add any analyses or panels to your template
- 8. Save Template